

Quality Site Requirement Alert (QSRA) 2013 - 05

April 5, 2013

QSR # 10: Security, Privacy and Confidentiality

All security, privacy, and confidentiality guidelines outlined in Publication 4299, *Privacy, Confidentiality, and the Standards of Conduct – A Public Trust*, must be followed.

Publication 4299 specifies the requirement for all partners and volunteers to protect physical and electronic taxpayer information both during and after the filing season. This includes any equipment used at the site such as computers and printers.

Concern:

There has been an increase in lost or stolen equipment reported. This alert is a reminder on the requirement to protect both partner and IRS-loaned equipment used to assist taxpayers with preparing their tax returns. Lost or stolen computers put taxpayer's information at risk. Site Coordinators and volunteers are required to have a process to ensure equipment is adequately protected at all times.

The required process includes:

- Recording the make, model, and serial numbers of all computer equipment and keep it in a secure location.
- Securing computer equipment used to prepare and transmit tax returns.
- Ensuring computers, hard drives, and other devices containing taxpayer data is protected at all times.
- Using secure storage rooms controlled by partners and/or volunteers.
- Ensuring all taxpayer information is protected during return preparation and after the taxpayer leaves the site.

References:

- Publication 1084, *IRS Volunteer Site Coordinator's Handbook*, page 24.
- Publication 4299, *Privacy, Confidentiality, and the Standards of Conduct – A Public Trust*, pages 7-8 provides guidance for reporting lost or stolen equipment.

If you have any questions, please discuss them with your site coordinator or contact your local IRS SPEC relationship manager.

Thank you for volunteering to serve your community and for your dedication to providing top QUALITY service!